Medicaid Management Information Systems

Maine Integrated Health Management Solution
Trading Partner Guide for Health Plans

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By accessing the Maine Health PAS Online portal, all users agree to protect the privacy and security of the data constrained within as required by law. Access to information on this site is only allowed for necessary business reasons, and is restricted to those persons with a valid user name and password.

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1. Introduction

This *Trading Partner Guide for Health Plans* describes several processes that will be useful to health plans that want to register as trading partners. The following sections contain a list of the information needed before starting the registration process, as well as, a detailed description of how to complete each of the registration steps.

If the user is not a health plan that wants to register as a trading partner, refer to the appropriate document in the Trading Partner Guides repository on the MIHMS Health PAS Online Portal (online portal.)

2. Information Needed

Before registering as a trading partner, make sure that the following information is readily available:

- Tax ID (FEIN or SSN) for the health plan
- Name, business address, business telephone number, and email address for the person who is completing the trading partner registration. (This information will be used to create the main trading partner account for the health plan.)
- (Optional) The names and email addresses of additional people to affiliate to the main trading partner account as health plan representatives. Health plan representatives may be additional parties who work for the health plan that may have an interest in such activities as business needs change.

***NOTE**: This information will be used to create the trading partner account for the health plan.*

3. System Requirements

To successfully use all features of the online portal, ensure that computer systems meets the following minimum requirements:

- Reliable online connection
- Web browser – The online portal supports the following browser types and versions:
  - Microsoft Internet Explorer versions 8, 9, and 10
  - Mozilla Firefox versions 33 and 34
  - Google Chrome version 39
- The latest version of Adobe Acrobat Reader

4. Complete the Registration Steps

4.1 Choose the Trading Partner Registration Link

Click the Register link to access the first trading partner registration page. The link is located on the left side of the online portal Provider page, as shown in Figure 4-1 below.

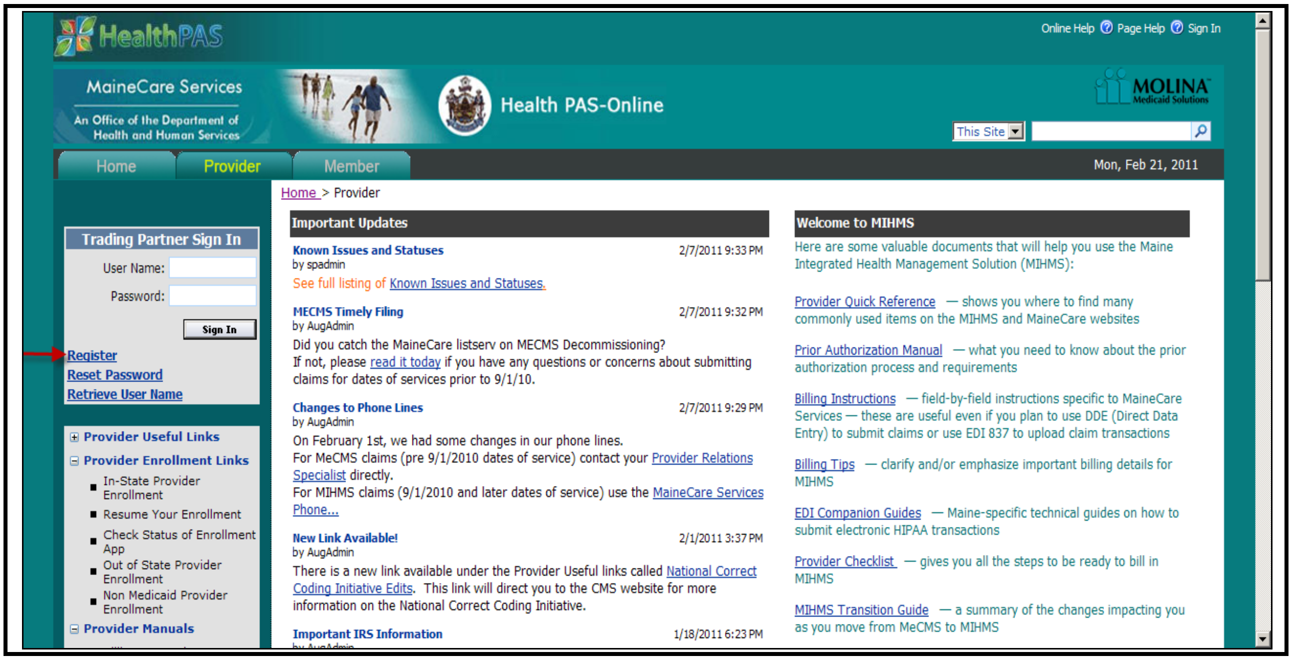

Figure 4-1: Trading Partner Registration

4.2 Provide Demographics Information

The first trading partner screen is shown below in Figure 4-2. On this screen, first select the Health Plan type of trading partner from the drop-down menu.

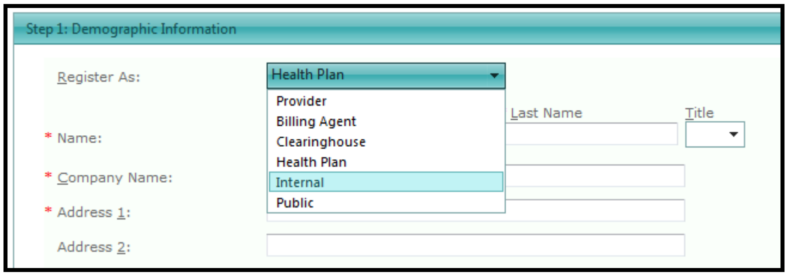

Figure 4-2: Register As

To complete the demographics screen, follow the steps below- see Figure 4-3.

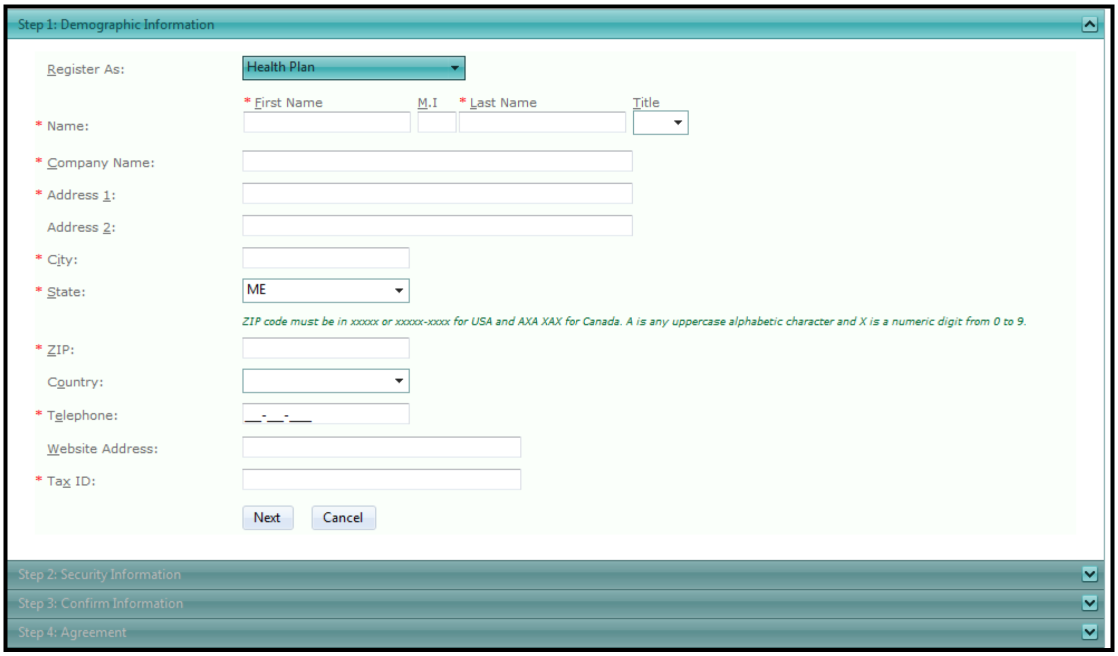

Figure 4-3: Demographics Information

1. In the Name fields, indicate the name of the person completing this registration. First and last names are required; the middle initial and a title are optional.
    a. In the Company Name field, indicate the Health Plan name. This is a required field.
    b. In the Address 1 field, indicate the first line of the business address. This is a required field.
    c. In the Address 2 field, indicate the second line of the business address. This is an optional field.
    d. In the City, State, and ZIP fields, indicate the appropriate information for the business address. These fields are required.
    e. In the Country field, indicate the country of the business. This is an optional field.
    f. In the Telephone fields, provide the business phone number, including area code. This is a required field.
    g. Indicate the website address (URL) for the business. This is an optional field.
    h. In the Tax ID field, indicate the Health Plan's tax ID (FEIN). This is a required field.

2. Complete one of the following:
   - To continue to the next step in the registration process, click the **Next** button. Proceed to the Section 4.3: Specify Security Information.
   - To cancel the registration, click the **Cancel** button.

4.3 Specify Security Information

On the second screen, create a user name, password, and security question and answer. Specify a valid email address.

The Security Information screen appears as shown in Figure 4-4 below.

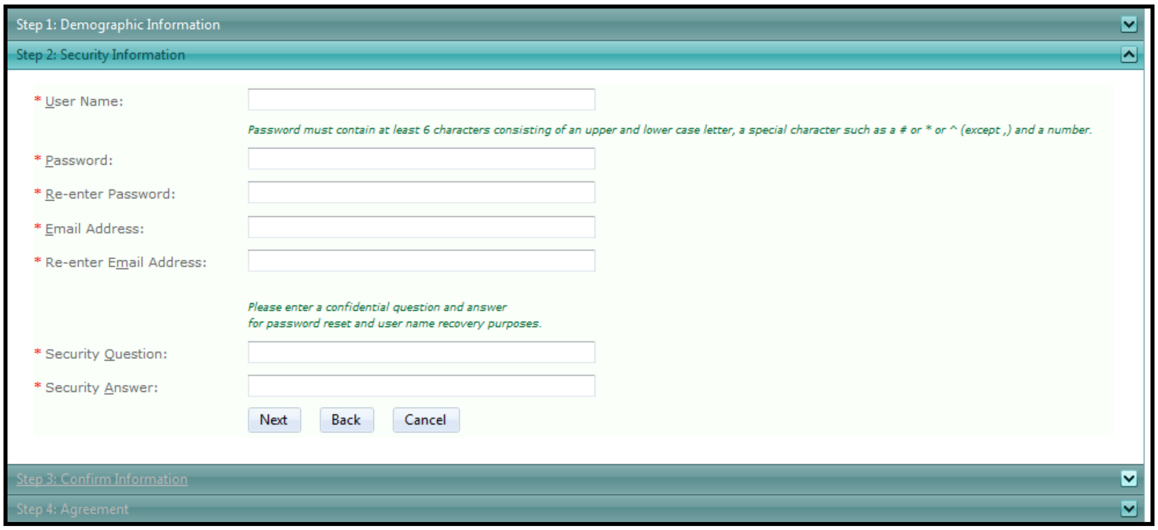

Figure 4-4: Security Information

To complete the Security screen, follow the steps below:

1. In the User Name field, type a user ID.
2. In the Password field, type a password. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk [*]) and a number. The password may not contain spaces.
3. In the Re-Enter Password field, retype the password exactly as typed in the Password field.
4. In the Email Address field, type a valid email address. (A confirmation email is sent to this address, so it is important that the address is valid.)
5. In the Re-Enter Email Address field, retype the email address exactly as typed in the previous field.
6. In the Security Question and Answer fields, make up and type a confidential question and its answer, respectively. (For example, “What street did I live on as a child?” or “What was the make of my first car?”) If a password is forgotten, this question and answer pair will be used to verify user’s identity.

***NOTE**: All fields are required.*

7. Complete one of the following:

- To continue to the next step in the registration process, click the **Next** button. Proceed to Section 4.4: Confirm Information.
- To return to the previous registration step, click the **Back** button. Refer to 4.3: Specify Security Information, for instructions.
- To cancel the registration, click the **Cancel** button.

4.4 Confirm Information

After completing the Security Information screen, click the Continue button, the Confirm Information screen appears, as shown in Figure 4-5 below.

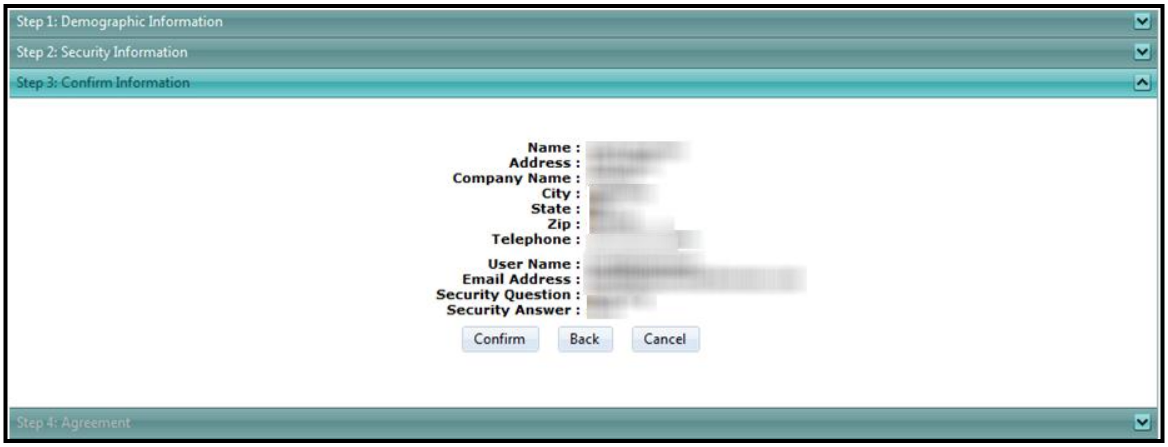

Figure 4-5: Confirm Information

Verify that all information displayed on this screen is accurate. If anything is incorrect, click the **Back** button to go back to the screen where the information was originally entered; correct the field, and click the **Next** or **Update** button until reaching the Confirm Information screen again.

After verifying the accuracy of the information on this screen, complete one of the following:

- To continue to the next step in the registration process, click the **Confirm** button. Proceed to Section 4.5: Sign the Agreement Electronically.
- To return to the previous registration step, click the Back button. Refer to Section 4.3: Specify Security Information, for instructions.
- To cancel the registration, click the **Cancel** button.

4.5 Sign the Agreement Electronically

After confirming the information, the Electronic Signature screen appears, as shown in Figure 4-6 below.

Figure 4-6: Electronic Signature

On the Electronic Signature screen, the Trading Partner Agreement (TPA) is displayed. Be sure to read the agreement. To agree to the terms and conditions of the Agreement, click the **checkbox** below it that indicates **"Yes, I agree to the above terms and conditions".**

To sign the Agreement, type the first and last names as it was entered on the Demographics Information screen (Step 1/5) in Section 4.2: Provide Demographics Information exactly as they appear there. Then, complete one of the following:

1. To print the trading partner agreement, click the **Print** link that is located below the right side of the agreement screen. This could be useful to facilitate any reviews of the agreement.
2. To complete the registration process, click the **Register** button. Proceed to Section 4.6:Activate Account. To go back to the Confirm Information screen, click the **Back** button. Refer to Section4.4: Confirm Information, for instructions.
3. To cancel the registration, click the **Cancel** button.

4.6 Activate Account

After signing the Trading Partner Agreement and click the **Register** button, the Registration screen appears, as shown in Figure 4-7 below.

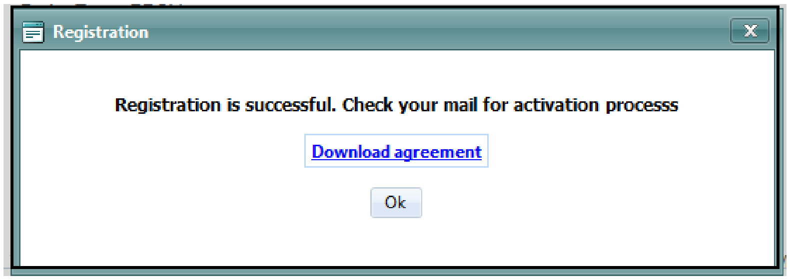

Figure 4-7: Registration

A pdf version of the TPA can be downloaded by selecting the **Download agreement** link. Select the **Ok** button to complete registration. After account activation, a confirmation email with the trading partner ID (TPID) is sent to the address specified during the registration process.

5. Trading Partner Login

Once the account is activated, log in to the secure trading partner features, by entering the user name and password in the online portal Provider page fields- see Figure 5-1 below, and then click the **Sign In** button.

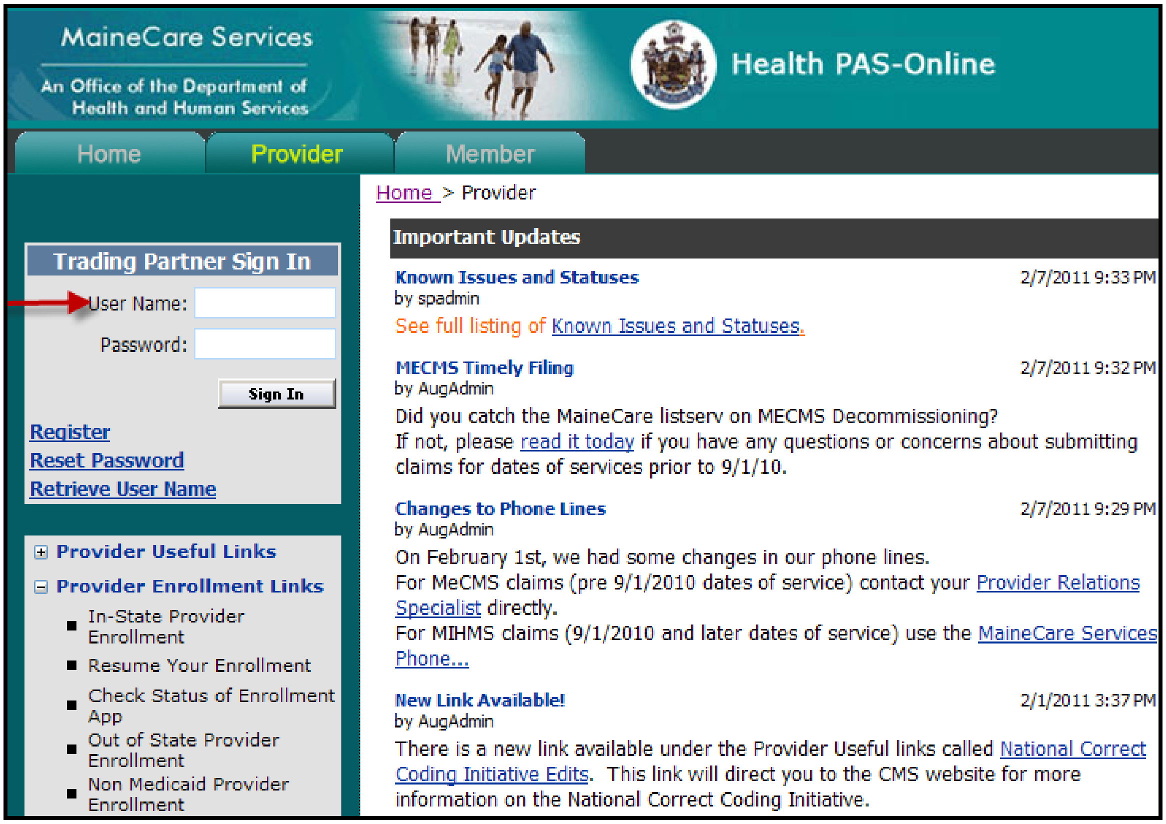

Figure 5-1: User Name and Password

The Welcome to Trading Partner screen appears, as shown in Figure 5-2 below.

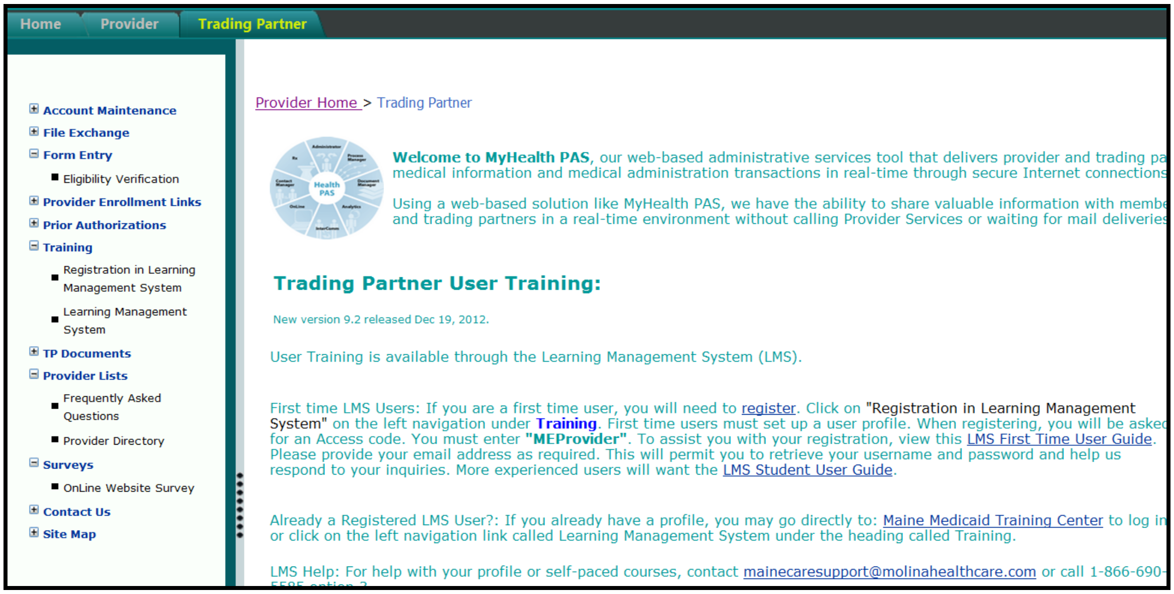

Figure 5-2: Welcome to Trading Partner

6. Trading Partner Logoff

When the user has logged in as a trading partner, the top status bar changes to indicate both the trading partner ID (TPID) and the user name for the person that is currently logged in. A sample status bar in Figure 6-1 below.

Figure 6-1: Trading Partner ID and User Name

To log off from the online portal, click on the **Sign Out** button, as shown in Figure 6-2 below.

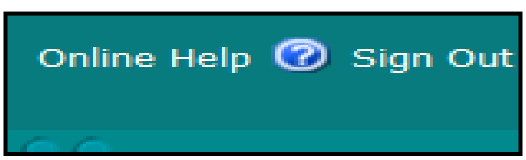

Figure 6-2: Menu on Status Bar

7. Account Maintenance

7.1 Password Reset Overview

For additional security, users are required to change the password of the trading partner log in every 60 days. The user name does not change, but the password must be changed. If the password is not changed after 60 days, the user is prompted to reset the password at the next sign in.

If the password for the trading partner user name needs to be reset, the following methods are used:

- If the current password is known, the password is reset using the Account Maintenance feature. This method is described in [Section 7.2:Resetting When the Current Password is Known]
- If the current password is not known, it is reset from the online portal Provider page. This method is described in [Section 7.3:Resetting When the Current Password is Not Known]

7.2 Resetting When the Current Password is Known

If the current password for the trading partner user name is known, sign in to the online portal. The online portal displays the Welcome to Trading Partner screen, as shown in Figure 7-1 below.

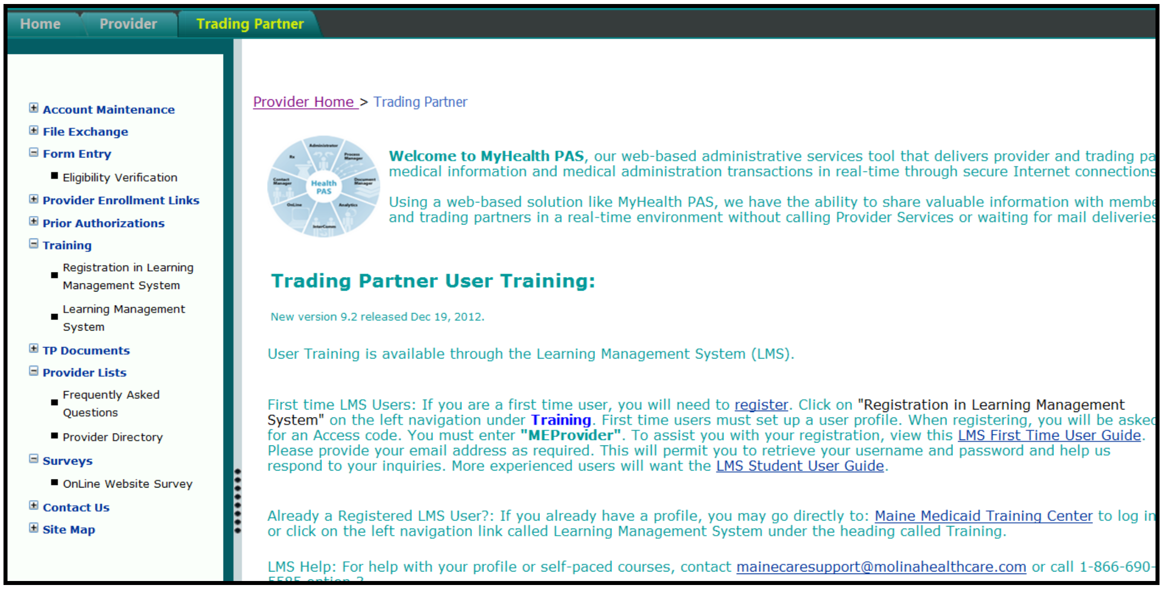

Figure 7-1: Welcome to Trading Partner

From the menu at left, choose the **Account Maintenance** link to expand the list. From the expanded list, choose the **Reset Password** option. The Reset Password screen appears, as shown in Figure 7-2 below.

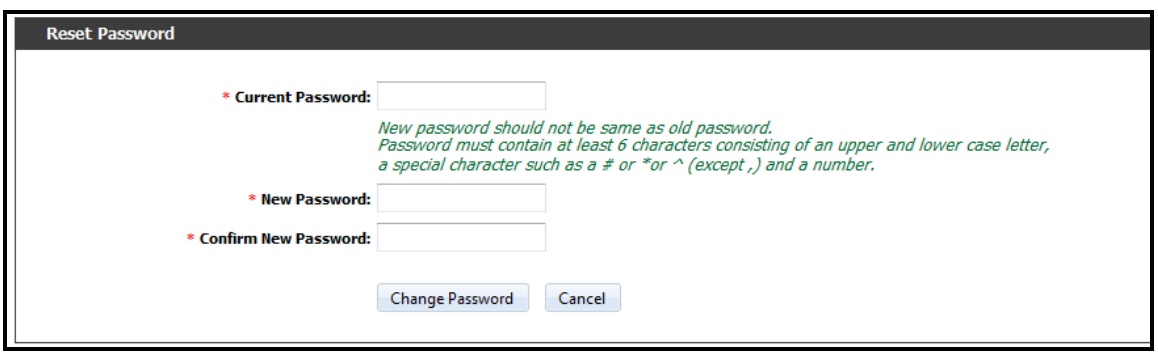

Figure 7-2: Reset Password

To reset the password, follow the steps below:

1. In the Current Password field, specify current password.
2. In the New Password field, type a different password that follows the password guidelines. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk [*]) and a number. The password may not contain spaces.

3. In the Confirm New Password field, retype the password exactly as typed in the New Password field.
4. Click the Change Password button. The online portal displays a confirmation message, as shown in Figure 7-3 below.

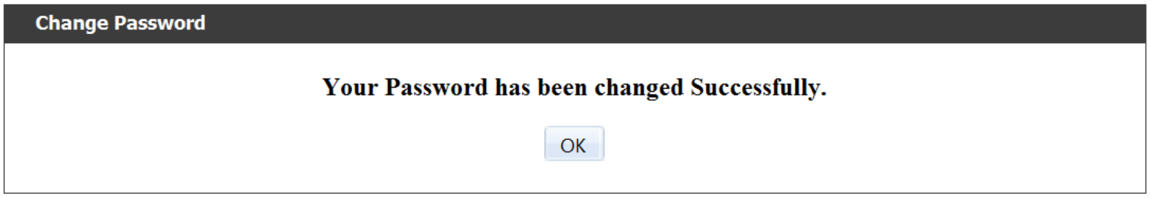

Figure 7-3: Confirmation Message

5. Click OK to continue. The online portal returns to the Welcome to Trading Partner Screen.

7.3 Resetting When the Current Password is Not Known

If the current password is forgotten or lost for the trading partner user name, it is reset from the online portal Provider page. To begin, choose the Reset Password link, as shown in Figure 7-4 below.

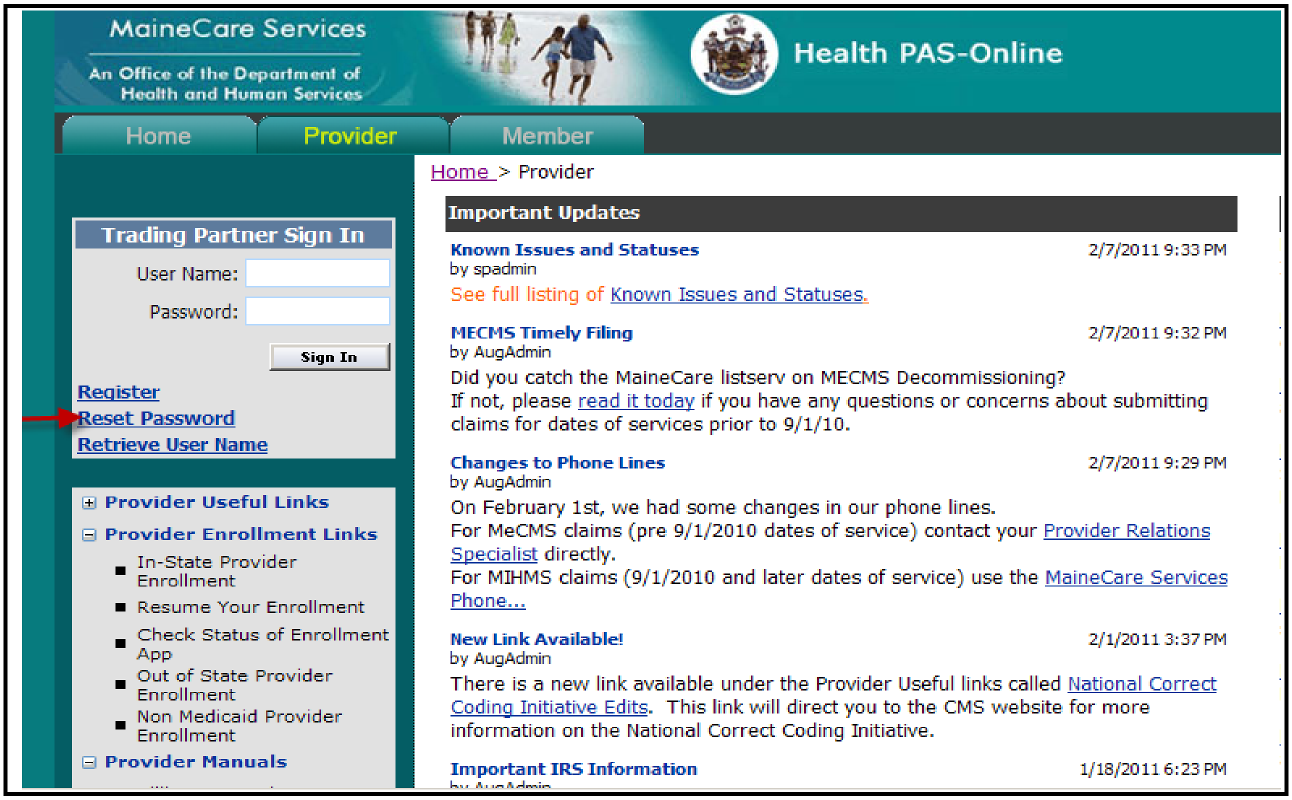

Figure 7-4: Reset Password Link

1. The online portal displays the Trading Partner Reset Password screen, as shown in Figure 7-5 below.

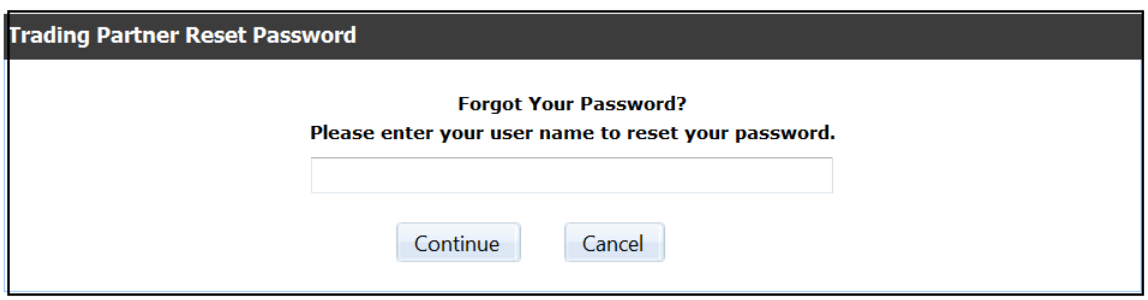

Figure 7-5: Forgot Your Password

2. Specify the trading partner user name in the box and click the **Continue** button.
3. The online portal displays the email address and security question associated with this user name, as shown in the Figure 7-6 below.

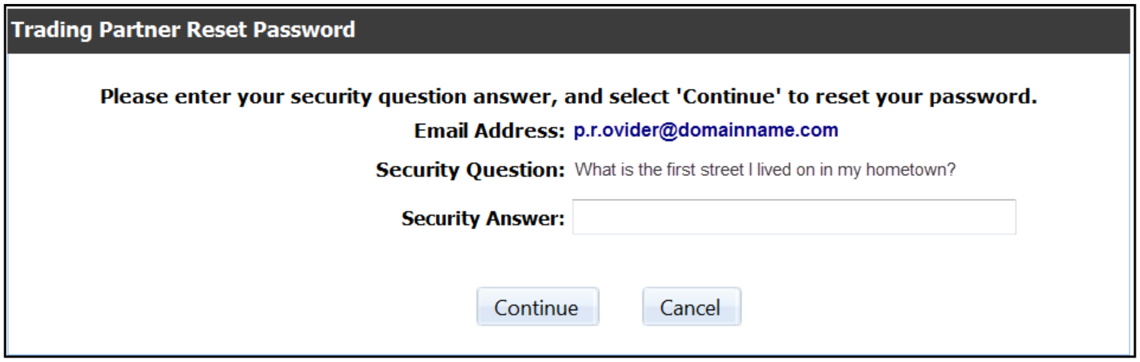

Figure 7-6: Email Address and Security Q&A

4. Type the answer to the security question in the Security Answer box and click the **Continue** button. If the question is answered successfully, the online portal sends an email to the address associated with the user name and displays the confirmation message shown in Figure 7-7 below.

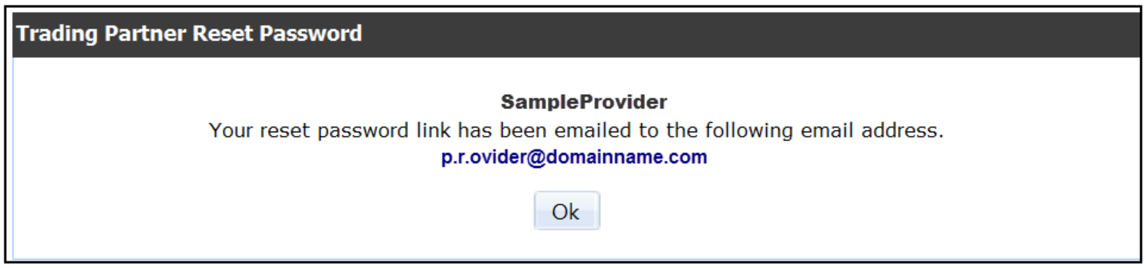

Figure 7-7: Confirmation of Password

5. The email contains a confirmation link and activation PIN. After receiving the email, click the **link** (or copy it and paste it into the address bar of a web browser). The online portal displays the Change Password screen with the user name and activation PIN already filled in, as shown in Figure 7-8 below.

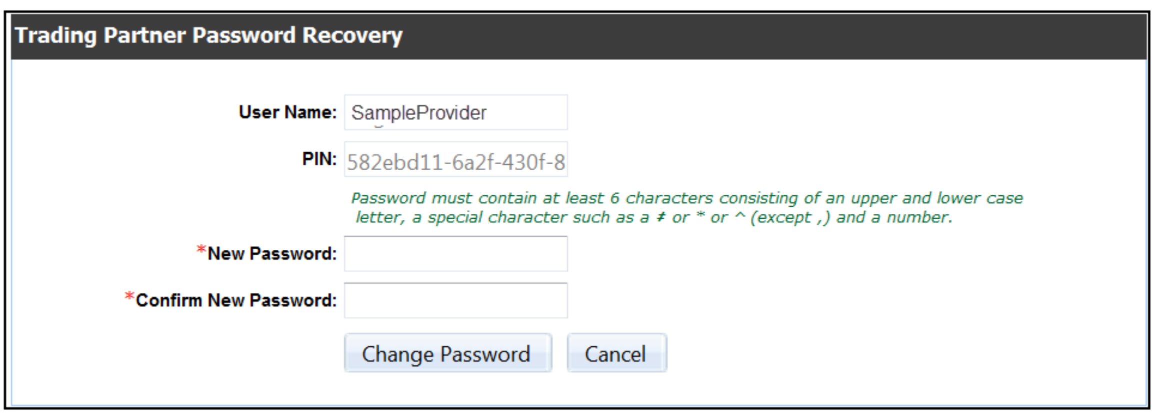

Figure 7-8: Change Password

6. To complete the Change Password screen, follow the steps below:

    a. In the New Password field, type a password that follows the password guidelines. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk [*]) and a number. The password may not contain spaces.

b. In the Confirm New Password field, retype the password exactly as typed in the New Password field.

c. Click the **Change Password** button. The online portal displays a confirmation message, as shown in Figure 7-9 below.

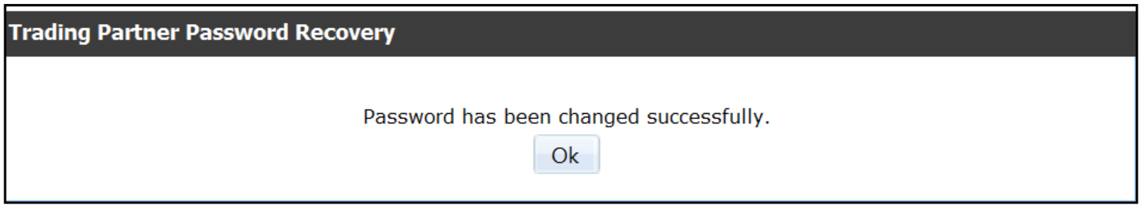

Figure 7-9: Password Reset

7.4 User Name Retrieval

If the trading partner user name is forgotten it is retrieved using the Retrieve User Name link on the online portal Provider page- see Figure 7-10 below.

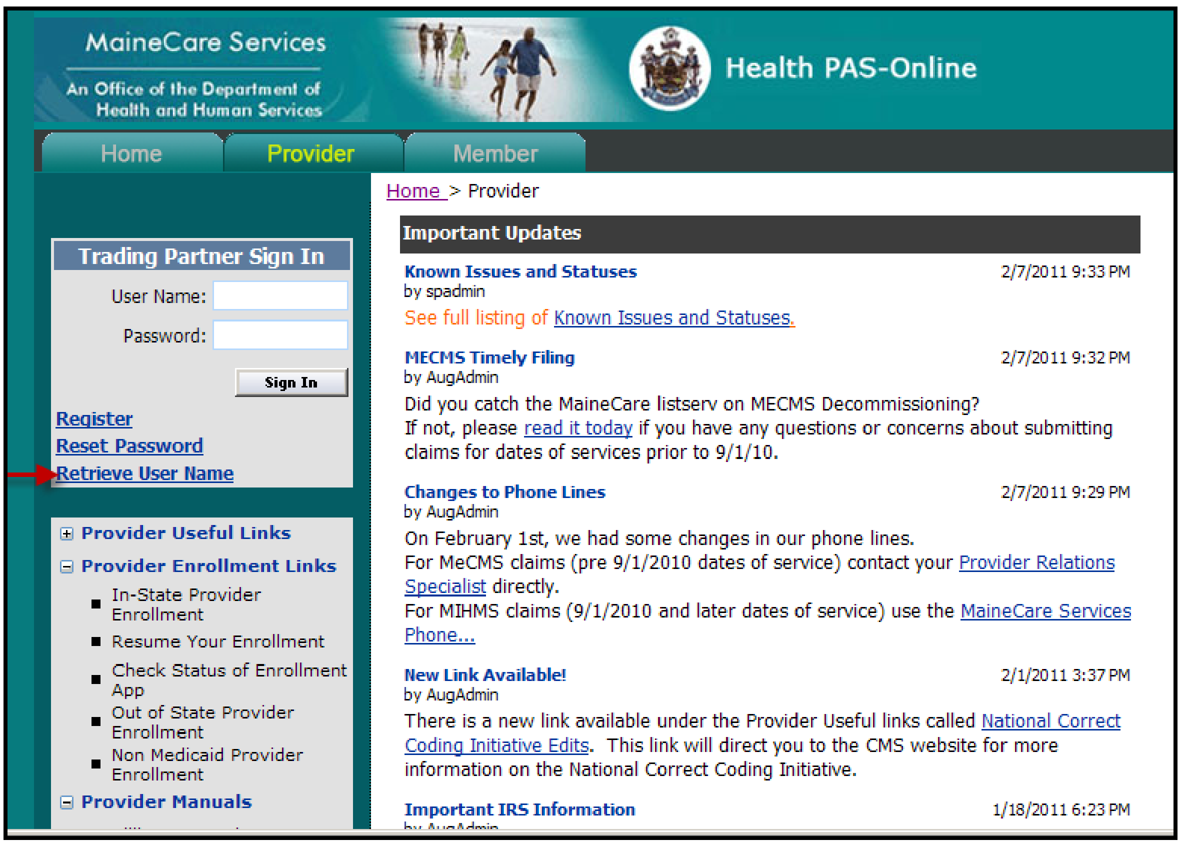

Figure 7-10: Retrieve User Name Link

1. After clicking the link, the online portal displays the Retrieve User Name screen, as shown in Figure 7-11 below.

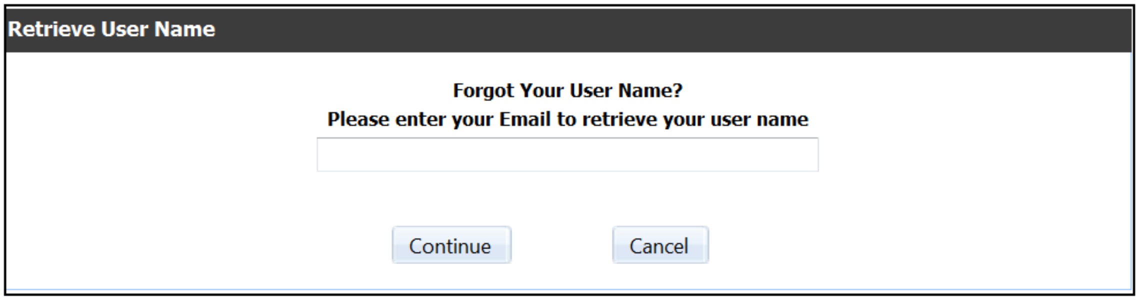

Figure 7-11: Email Specification for User Name Retrieval

2. Type the email address for the user name to retrieve. Click the **Continue** button.
3. If the email address entered is associated to multiple trading partner accounts, the online portal will display an error, as shown in Figure 7-12 below. (If the email address is associated to only one trading partner account the online portal will not show this error.)

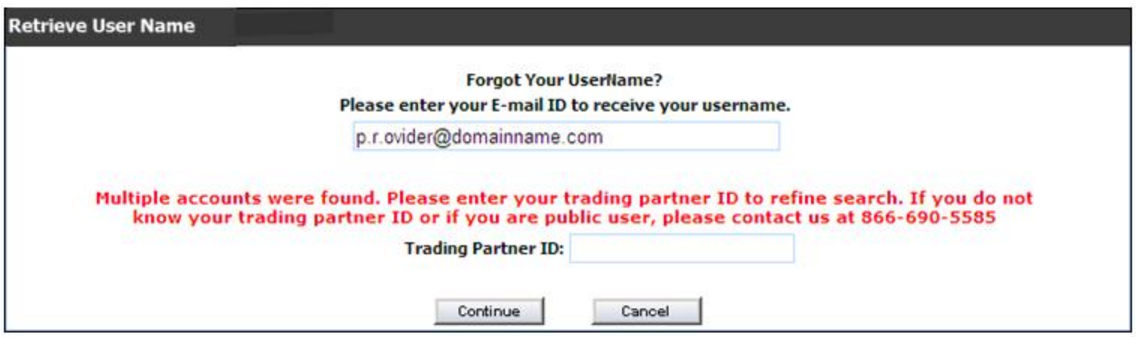

Figure 7-12: Multiple Accounts Error

4. If this error appears, enter the trading partner ID (TPID) in the field provided. (This number was emailed to the user when the trading partner account was created. It is the same number that is used as the sender ID for X12 submissions.) Click the **Continue** button.

NOTE*: If the trading partner ID is not known, call the number listed in the error message for additional assistance.*

5. After entering the email address (and trading partner ID, if needed) and clicking the Continue button, the online portal displays the email address and security question, as shown in Figure 7-13 below.

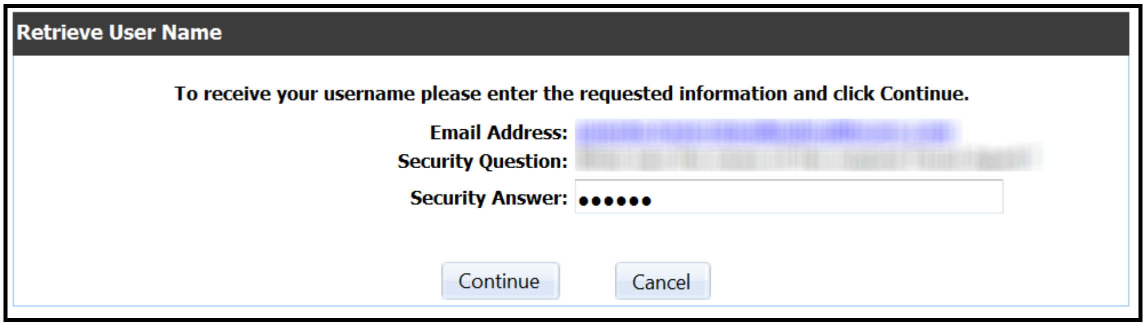

Figure 7-13: Email Address and Security Q&A

6. Type the answer to the security question in the Security Answer box and click the **Continue** button. If the question is successfully answered, the online portal sends an email to the address associated with the user name and displays the confirmation message shown in Figure 7-14 below.

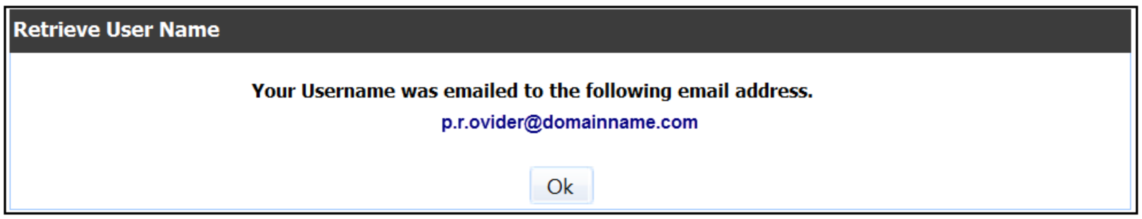

Figure 7-14: Confirmation Message for User Name Retrieval

7. Click Ok. The email contains the user name and trading partner ID.

7.5 Manage Users

7.5.1 Adding Users

Use the Manage Users link to grant new users access to the health plan trading partner account.

1. Sign in to the secure trading partner area on the online portal Provider page
2. On the Trading Partner Welcome Screen, expand the **Account Maintenance** option in the far left column
3. Choose the **Manage Users** option as shown in Figure 7-15 below.

Figure 7-15: Account Maintenance

4. Click the **Add User** button, as shown in Figure 7-16 below.

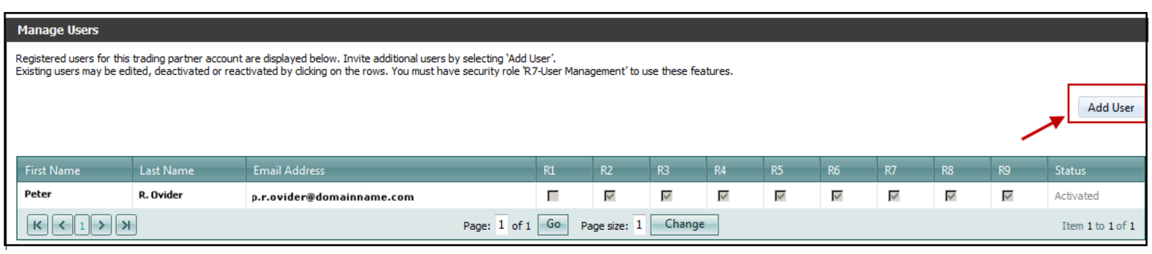

Figure 7-16: Add User

5. The Manage Users screen updates to display the fields needed to invite an additional user and specify their permissions, as shown in Figure 7-17 below.

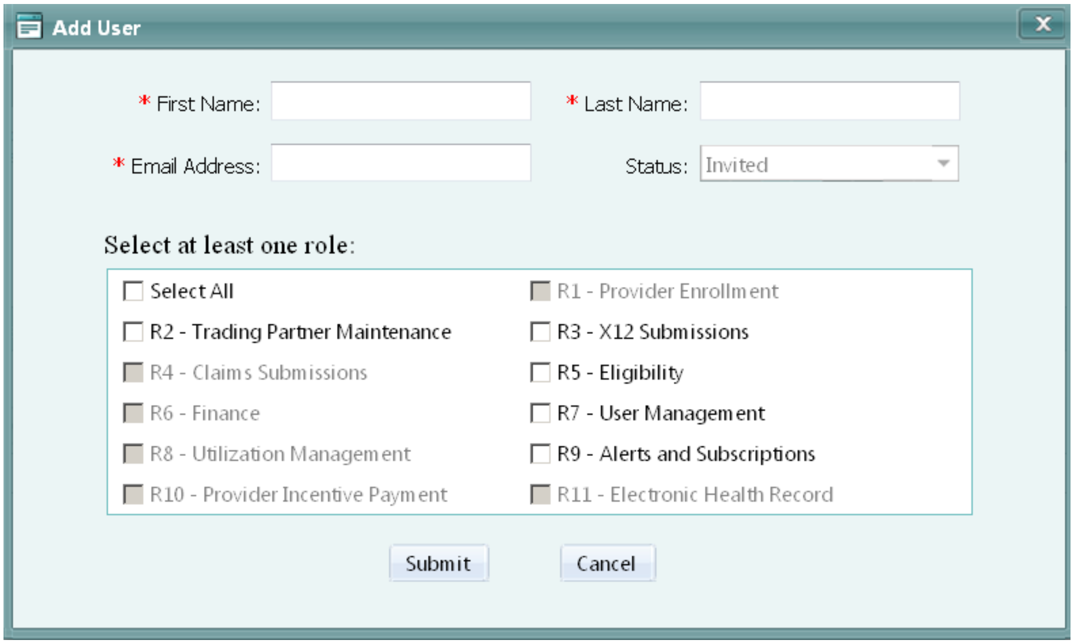

Figure 7-17: Permission Fields

6. To complete the fields, follow these steps:
   a. Specify the invited user's first and last names in the First Name and Last Name fields, respectively. These are required fields.
   b. In the Email Address field, specify the invited user's email address. This is a required field.
   c. Select R3 -- Ability to submit eligibility X12 batch files.
   d. Select R5 – Ability to submit eligibility enquiries using Direct Data Entry.

NOTE*: Health Plans will only be able to submit eligibility transactions*

7. Click the **Submit** button. The online portal sends an email invitation to the specified user. The Manage Users screen displays the invited user's name, email address, and permissions as shown in Figure 7-18 below.

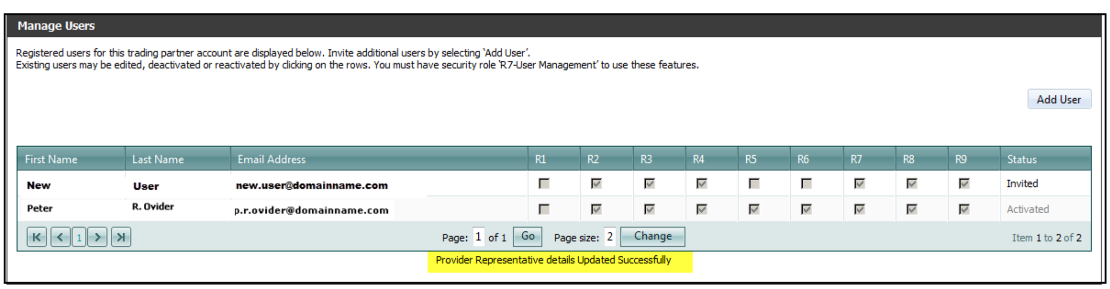

Figure 7-18: Invited Users

In order for the invited user to activate their account, they must follow the steps described in Section 7.5.2 (Invited Users Only) Activating a Trading Partner Representative Account

8. To invite additional users, repeat the process described in Steps 4 through 7 above.

7.5.2 (Invited Users Only) Activating a Trading Partner Representative Account

When a user is invited to create a trading partner representative account, an email is sent that contains an activation link. The invited user should click the link to begin their enrollment process, as shown in Figure 7-19 below.

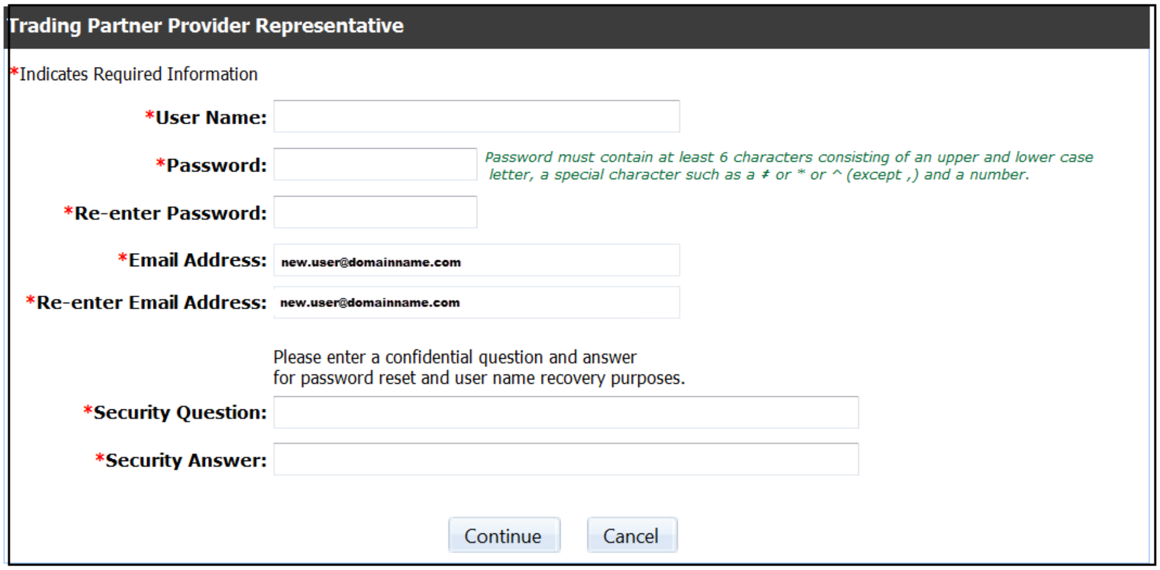

Figure 7-19: Trading Partner Registration

To complete this screen, follow these steps:

1. In the User Name field, type a user ID.
2. In the Password field, type a password. It must be at least six characters long and contain at least one each of an upper case letter, a lower case letter, a special character (such as an asterisk [*]) and a number. The password may not contain spaces.
3. In the Re-Enter Password field, retype the password exactly as typed in the Password field.
4. In the Email Address field will be auto-populated. Verify this information is accurate.
5. In the Re-Enter Email Address field will be auto-populated. Verify this information is accurate.
6. In the Password Question and Answer fields, type a confidential question and its answer, respectively. (For example, “What street did I live on as a child?” or “What was the make of my first car?”) If a password is forgotten this question and answer pair will be used to verify the user’s identity.

***NOTE**: All fields are required.*

7. Click the **Continue** button. The online portal creates the user name and password as specified. (To log in to the secure trading partner feature, the invited user will use this information in the User Name and Password fields on the online portal Provider page. Refer to Section 5: Trading Partner Login for more information about logging in to the online portal.

7.5.3 Trading Partner Permission Codes

Though each user on trading partner account must have at least one permission, any combination of the permissions are available to assign. Locate in this section a table listing all permission codes and another detailing the powers that each code grants to users- see Table 1 and Table 2 below.

Table 1: Trading Partner Permission Codes & Descriptions

Requires TPA	Code	Trading Partner User Access Area	User Powers*
Y	**R1**	Provider Enrollment Maintenance	Provider account maintenance
Y	**R2**	Trading Partner Maintenance	Account maintenance including provider associations and demographics updates (Clearinghouses do not require provider associations)
Y	**R3**	X12 EDI Transactions	File Exchange (X12), and report access
Y	**R4**	Claim Submission, Claim Status	Access Remittance Advice (PDF) and reports, claim submission, claim status, patient roster and primary care roster
Y	**R5**	Eligibility Verification	Eligibility verification, patient roster and primary care roster
Y	**R6**	Payment Status	Provider payment status
Y	**R7**	User Management	Manage account users
Y	**R8**	Referral Submission & Status, Authorization Submission & Status	Authorization submission, authorization status, patient roster, primary care roster, referral submission and referral status
Y	**R9**	Alerts and Subscriptions	EDI Gateway alerts and subscriptions– these advise trading partners when they have a X.12 (825, 271, RA etc.) response awaiting collection.
* All codes grant personal password reset powers.			

Not all powers are available to every type of trading partner account. For the list of the powers available to users for Health Plan trading partner accounts, refer to Table 2 below.

Table 2: Health Plan User Powers Grid

Requires TPA	Menu Item	Health PAS Online User Access*	Health Plan
	Account Maintenance		**Access Rights**
Y	Manage Users	R7	X
Y	Provider Associations	R2	
Y	Reset Password	All	X
Y	Update Demographics	R2	X
Y	File Exchange (X12)	R3	X
Y	Remittance Advice (PDF)	R4	
Y	Other Reports	All	X
Y	Alerts and Subscriptions	R9	X
	Form Entry		**Access Rights**
Y	Authorization Submission	R8	
Y	Authorization Status	R8	
Y	Claim Submission	R4	
Y	Claim Status	R4	
Y	Eligibility Information	R5	X
Y	Patient Roster	R4, R5, R8	
Y	Primary Care Roster	R4, R5, R8	
Y	Provider Payment Status	R6	
Y	Referral Submission	R8	
Y	Referral Status	R8	
	Provider Enrollment		**Access Rights**
Y	Provider Maintenance	R1	

7.5.4 Modifying User Permissions

To modify the permissions granted to a health plan representative, the user must have R7 (User Management) permission for the trading partner account. Follow the steps below:

1. Sign in to the secure trading partner area on the online portal Provider page.
2. On the Welcome to Trading Partner screen, expand the **User Maintenance** option in the far left column.
3. Choose the **Manage Users** option. The online portal displays the initial Manage Users screen, as shown in Figure 7-20 below.

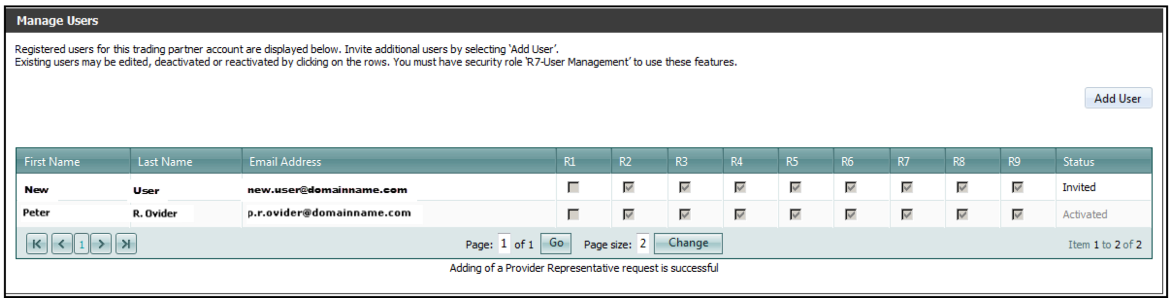

Figure 7-20: Manage Users

4. Click **anywhere on the row** of the user whose permissions need to be modified. The Manage Users screen expands to show identification, status and permission fields for the user selected.
5. Modify the information as necessary- see Figure 7-21 below.

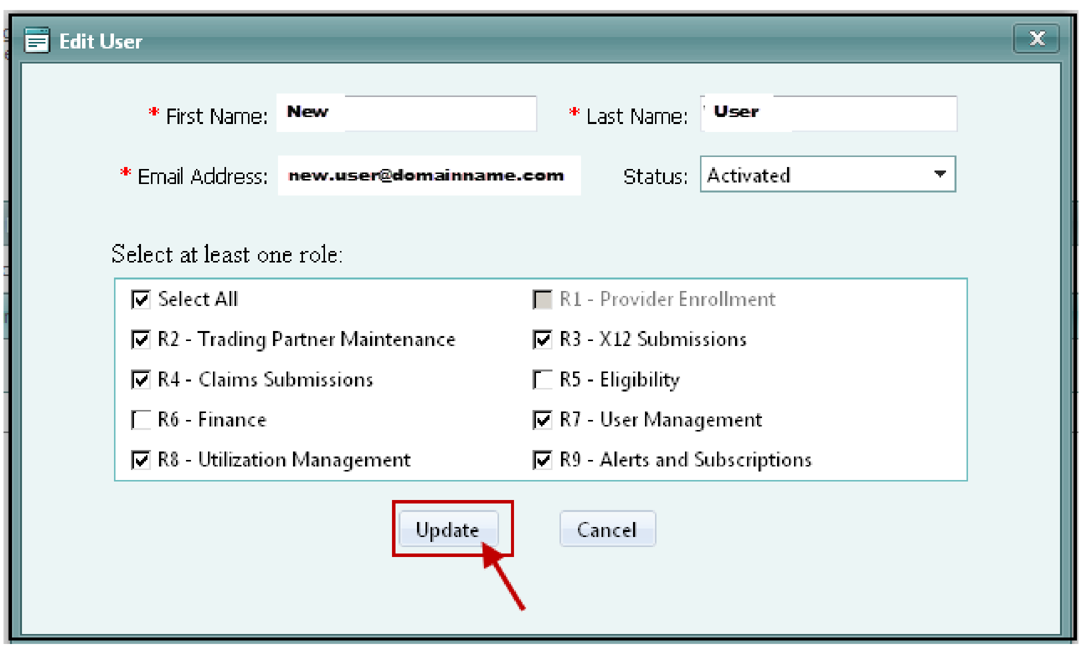

Figure 7-21: Additional Permissions

6. Click the **Update** button. The online portal saves the changes and refreshes the screen to show the user list with the modified permissions, as shown in Figure 7-22 below.

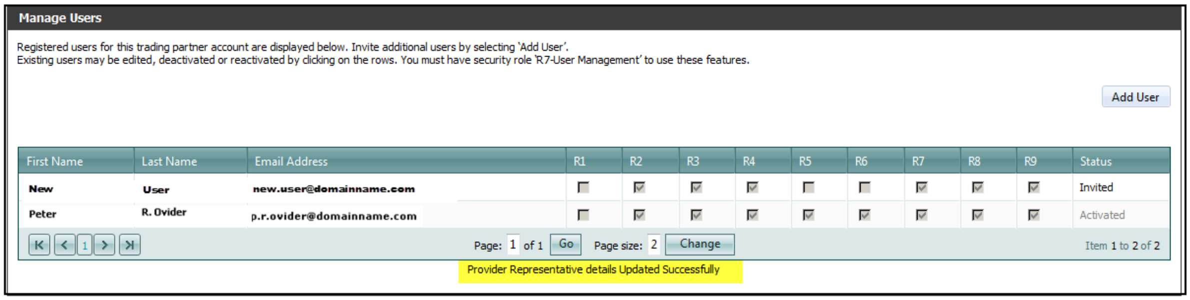

Figure 7-22: User List Modified Permissions

7.5.5 Terminating a User

It is important for health plans to maintain their trading partner accounts and inactivate users when they should no longer have access (e.g. when a user has left the business.)

To complete this screen, follow these steps:

1. Sign in to the secure trading partner area on the online portal Provider page.
2. On the Welcome to Trading Partner screen, expand the **User Maintenance** option in the far left column.
3. Choose the **Manage Users** option. The online portal displays the initial Manage Users screen, as shown in Figure 7-23 below.

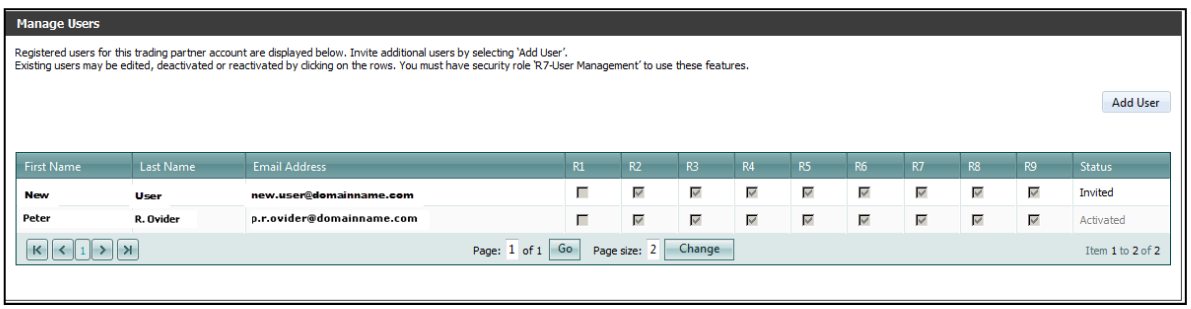

Figure 7-23: Manage Users

4. Click **anywhere on the row** of the user whose permissions need to be terminated. The Manage Users screen expands to show identification, status and permission fields for the user selected.
5. Click the **drop-down** arrow for **Status** and select **Terminated**, as shown in Figure 7-24 below.
6. Click the **Update** button. The online portal saves the changes and refreshes the screen.

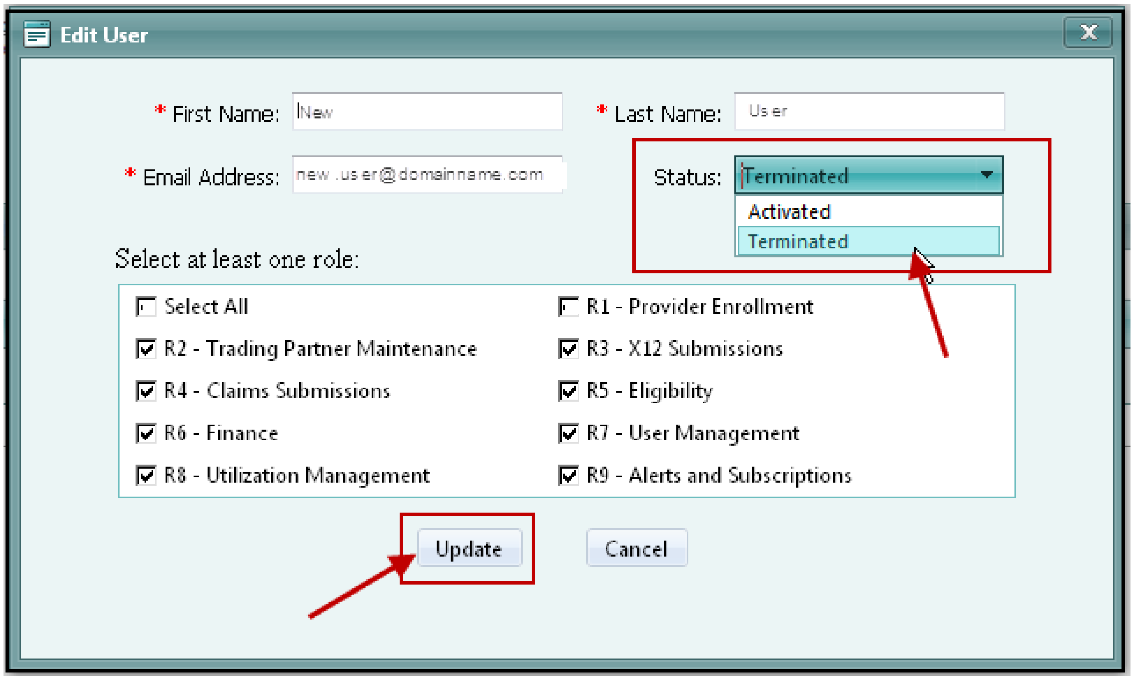

Figure 7-24: Status Field Drop-Down

7. The **Status** field now displays **Terminated**, as shown in Figure 7-25 below.

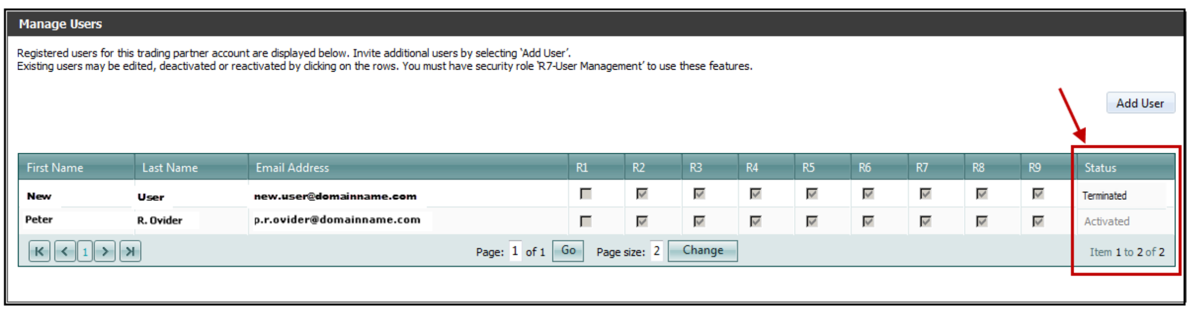

Figure 7-25: Updated Status Field